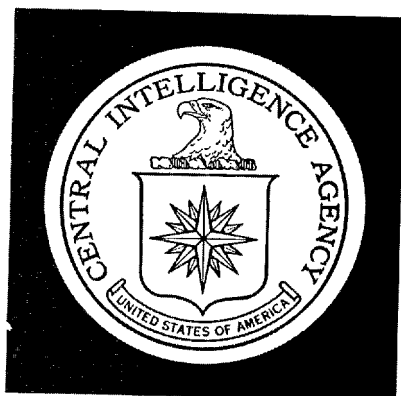


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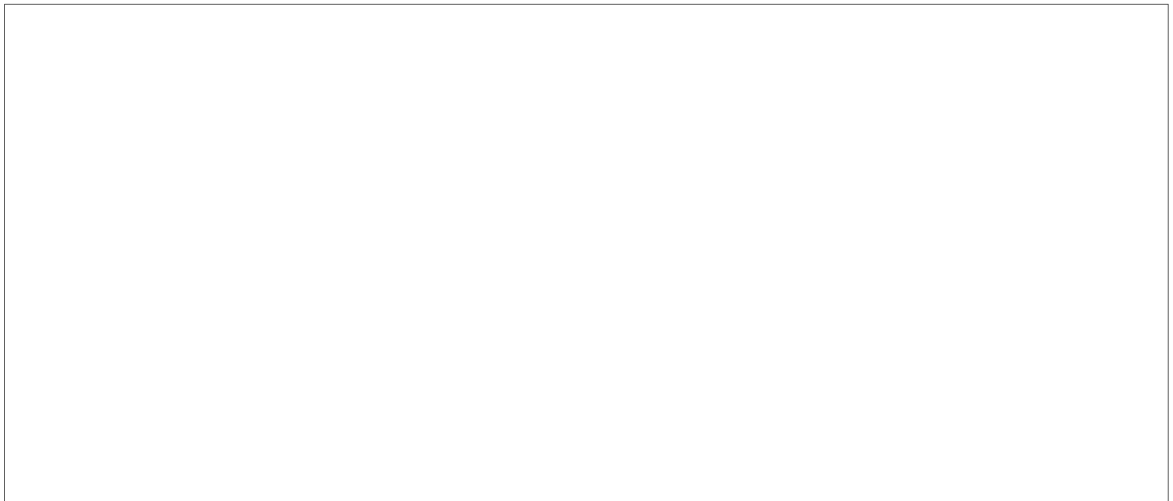
Intelligence Memorandum

*Foreign Shipping to North Vietnam
During September 1968*

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ER IM 68-140
October 1968

Copy No. **101**



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Foreword

The data in this memorandum are preliminary and subject to modification as additional information becomes available. Significant changes may occur in ship arrivals and cargoes from Communist China and, to a lesser extent, in cargoes carried by ships of the Free World. Soviet and Eastern European ship arrivals and cargoes and Free World arrivals are not likely to be changed significantly. To reflect changes in previous reports, a table showing monthly arrivals, by flag, is included in this memorandum. Weights of cargoes are expressed in metric tons. Because of rounding, components may not add to the totals shown.

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CENTRAL INTELLIGENCE AGENCY
Directorate of Intelligence
October 1968

INTELLIGENCE MEMORANDUM

Foreign Shipping to North Vietnam
During September 1968

Summary

Heavy rains and storms disrupted port operations in Haiphong during September, and congestion reached record levels. The average number of foreign dry cargo ships in Haiphong per day increased from 28 in August to 34 in September, and the average lay-over time for departing dry cargo ships increased from 32 days in August to 41 days in September. Severe congestion will continue in October, even though ship arrivals will decrease.

Foreign ship arrivals (37) and seaborne imports (137,000 tons) were only slightly higher in September than in August, and were well below monthly averages for January-August. Arrivals of Soviet and Free World ships both increased (see the chart). Soviet and Free World ships each carried about 61,000 tons of imports, and together accounted for almost 90 percent of the cargo delivered. Deliveries of foodstuffs fell 30 percent from 69,000 tons in August to 48,000 tons in September, whereas deliveries of petroleum increased about 160 percent, from 13,000 tons to 33,000 tons. No seaborne imports of arms or ammunition were detected during September.

In the first nine months of 1968, imports of both foodstuffs and petroleum exceeded by wide margins total deliveries for all of 1967. Changes

Note: This memorandum was produced solely by CIA. It was prepared by the Office of Economic Research and information on ship arrivals was coordinated with the Naval Intelligence Command.

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in the level and composition of imports in the first nine months of 1967 and 1968 are shown in the following tabulation:

	January-September				
	1967		1968		Percentage Change
	Thousand Tons	Percent of Total	Thousand Tons	Percent of Total	1968 over 1967
<i>Total imports</i>	1,091	100	1,475	100	35
Bulk food	325	30	563	38	73
Fertilizer	137	13	124	8	-9
Petroleum	185	17	288	20	56
Timber	13	1	18	1	38
General and miscellaneous	431	40	482	33	12

In September, seaborne exports dropped for the fifth month in a row -- to 25,000 tons, the smallest volume of exports since November 1967. Exports of coal dropped to 22,000 tons, only 30 percent of the peak 1968 volume of 76,000 tons in April.

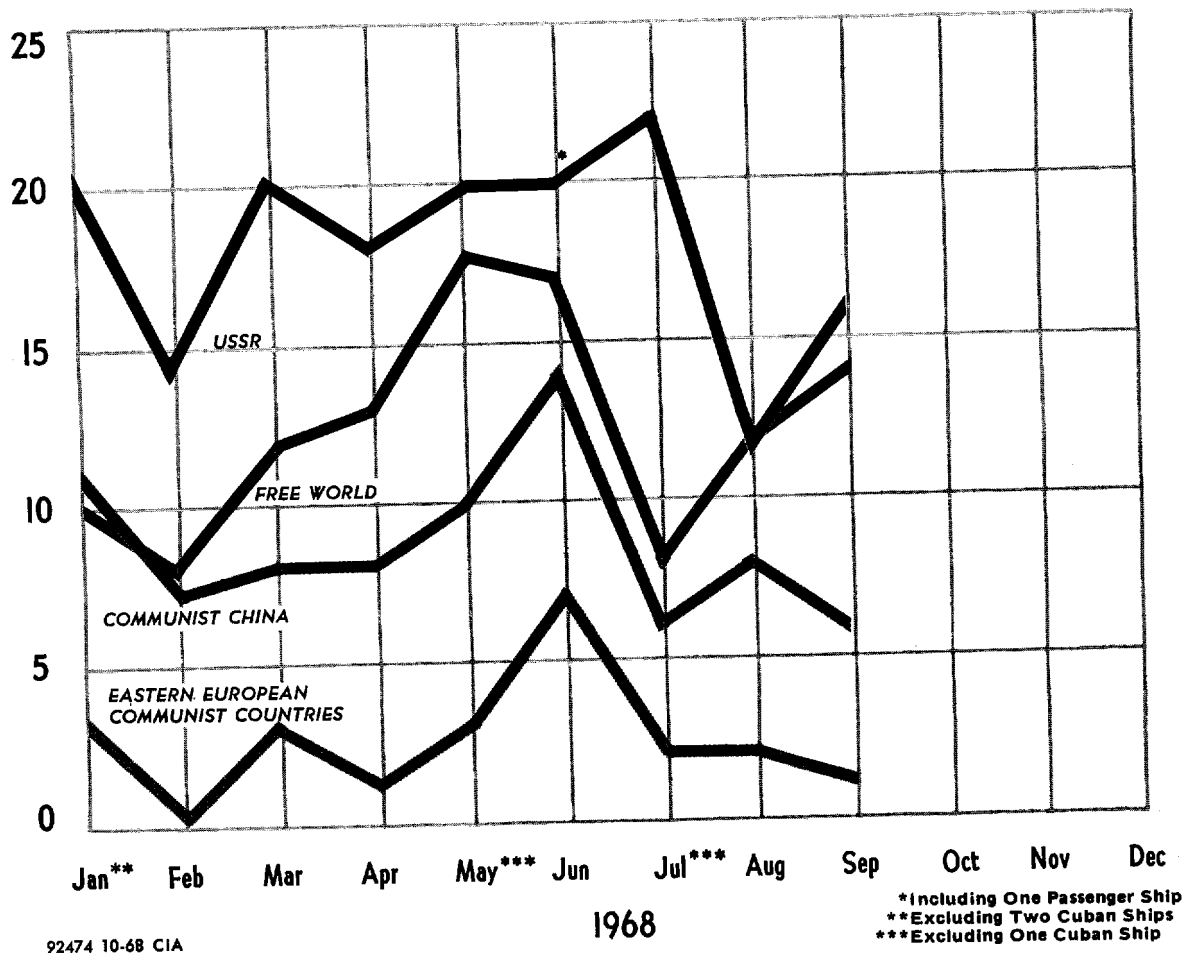
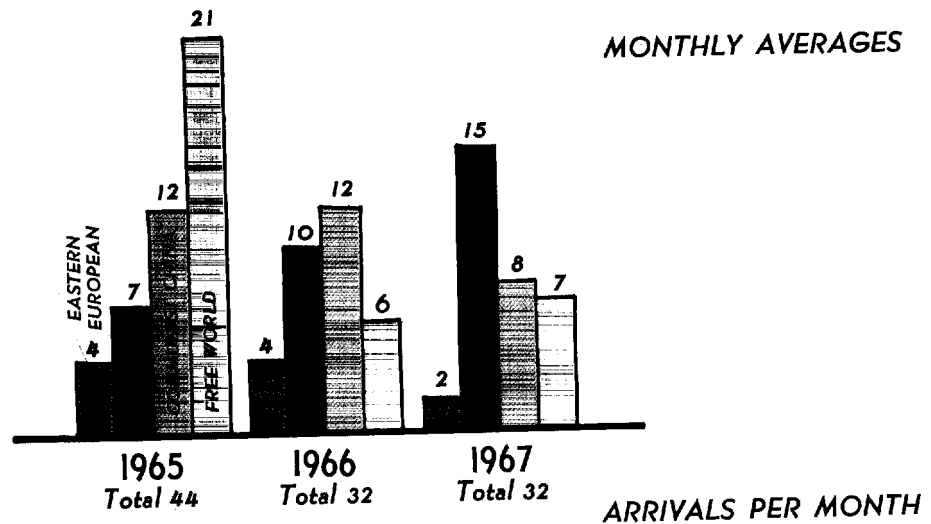
Ships Waiting for Berths in Haiphong, Diverted to an Anchorage in Halong Bay. (1) Seasage, UK; (2) Probable Laural, UK; (3) Frankford, UK; (4) Probable Shun Wan, UK; (5) Vinnitsa, USSR (tkr); (6) Probable Lucky Dragon, Singapore; (7) Probable Balashika, USSR; (8) Probable Belgorod Dnestrovsky, USSR.

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North Vietnam: Foreign-Flag Ship Arrivals



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Situation at the Ports

1. Congestion at Haiphong in September surpassed all previous levels. Adverse weather conditions in late August and early September, which forced a decrease in the cargo discharge rate, added to the already severe congestion problems at the port and probably contributed to the increase in the volume of cargo in open storage near the wharves which reached its highest level for the year.* It was also reported that stevedores were in short supply. A concentration of arrivals of dry cargo ships in the first two weeks of September increased the large backlog of ships** and contributed to the record 38 foreign dry cargo ships in Haiphong on 14 and 15 September. During September the average number of dry cargo ships in port per day reached a new high of 34, four more than the previous high in July.

2. The average layover time for dry cargo ships that departed Haiphong in September was 41 days,*** nine days more than in August and a new high. One Free World ship departed after spending more than three months in North Vietnam, and five other ships departed after stays of two months or longer. Congestion dropped slightly in the last two weeks of September after the tropical storms subsided, but will remain at a high level through October.

Arrivals

3. Thirty-seven foreign ships arrived at North Vietnam in September, three more than in August but six less than the monthly average for January-August. Arrivals of Soviet, Chinese Communist, and East European ships all were below the monthly average for January-August, and arrivals of Free World ships were slightly above, as shown in Tables 1 and 2 and in the following tabulation:

* Tropical storm Wendy, which struck the northern coast of North Vietnam on 9 September, caused numerous groundings and collisions in Haiphong, as well as several delayed departures.

** During late September an unusually large number of ships waiting for berths in Haiphong were diverted to an anchorage in Halong Bay, south of Hon Gai. By 5 October, nine ships were anchored in Halong Bay (see the photograph and the map).

*** The previous high was 33 days in August 1967.

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	1968		
	<u>September</u>	<u>August</u>	<u>January-August Monthly Average</u>
<i>Total arrivals</i>	37	34	43
Communist countries	<u>23</u>	<u>22</u>	<u>30</u>
USSR	16	12	18
Eastern Europe	1	2	3
Communist China	6	8	9
Cuba	0	0	1
Free World	<u>14</u>	<u>12</u>	<u>12</u>

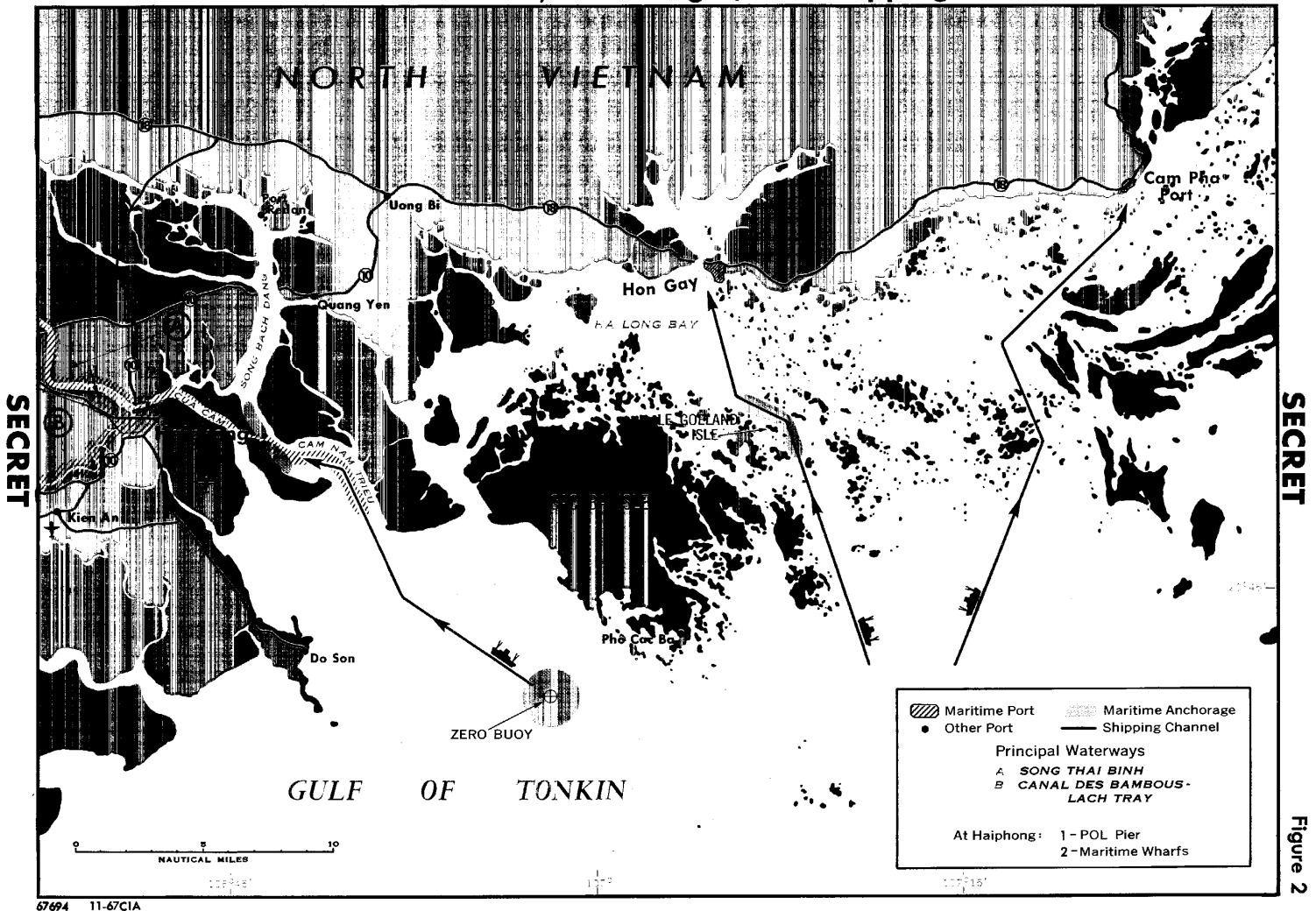
4. The 16 Soviet arrivals in September delivered 44 percent of total seaborne imports. The Soviet arrivals included six small tankers and seven small dry cargo ships from the Soviet Far East, one dry cargo ship from Cambodia, and two large-hatch ships from the Black Sea. The six Chinese ships that arrived in September all came from South China -- four with bulk food (one had some general cargo) and two in ballast to load coal. They delivered 9 percent of seaborne imports. The only Eastern European ship to arrive at North Vietnam during September delivered a partial load of bulk food and general and miscellaneous cargo from Eastern and Western European ports. The volume of cargo delivered by Eastern European ships to North Vietnam in September (2 percent of total seaborne imports) was the lowest since February.

5. All of the 14 Free World arrivals carried cargo -- a total of 60,700 tons. Eleven were British-flag ships (ten from North China and one from North Korea) and the other three (all on voyages from Eastern Europe) were flying the flags of Cyprus, Kuwait,* and Singapore. Eight Free World ships

* The arrival of the Maha in September was the first instance of a Kuwaiti ship entering North Vietnamese waters since at least 1964. Kuwaiti Government officials, alerted in June by US officials of the impending voyage of the Maha to North Vietnam, pointed out that their government had no diplomatic relations with either South or North Vietnam, but was willing to carry on commerce with either or both.

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NORTH VIETNAM: Maritime Ports, Anchorages, and Shipping Channels



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departed North Vietnam in August -- one carried coal and seven left in ballast. (For additional detail on arriving and departing ships, see Tables 3 and 4.)

Cargoes

6. Seaborne imports rose slightly from the August level to 137,000 tons in September, about 30,000 tons below the monthly average for January-August 1968. Imports from the USSR increased by 9,200 tons, and those from North Korea rose from 100 tons in August to 7,900 tons in September. Cargoes from China and Eastern Europe were down by small amounts. Bulk food deliveries were off nearly 30 percent from the August level, while petroleum deliveries rose about 160 percent. All import categories except petroleum were below the monthly level for January-August 1968, as shown in the following tabulation:

		<u>Monthly Average (Thousand Tons)</u>			
		<u>1967</u>	<u>1968</u>		
			<u>Jan-Aug</u>	<u>Aug</u>	<u>Sep</u>
<i>Total imports</i>		118	167	133	137
Bulk food		38	64	69	48
Fertilizer		13	15	5	4
Petroleum		21	32	13	33
Timber		1	2	0	1
General and miscellaneous		45	54	45	50

7. Bulk food imports fell from 69,200 tons in August to 48,400 tons in September, the lowest monthly total since April. The largest share of the deliveries came from China (30,400 tons) and consisted of rice, corn, and salt. Deliveries from the USSR of 14,600 tons were about the same as in August (14,800 tons), but were well below the January-July monthly level of 24,700 tons. Imports of bulk foods from all sources for the first nine months of 1968 exceeded the total delivered during all of 1967 by more than 100,000 tons.

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8. Seaborne imports of petroleum increased from a 1968 low of 12,900 tons in August to 33,400 tons in September, slightly above the monthly level for January-August. Six Soviet tankers and one Soviet cargo ship delivered 26,400 tons of petroleum from the USSR, and one British-flag tanker delivered 7,000 tons of petroleum from China. In the first nine months of 1968, imports of petroleum were more than 40,000 tons higher than the total delivered during all of 1967.

9. The only fertilizer delivered to North Vietnam in September was a single shipment from North Korea on a Free World ship. Fertilizer imports averaged only 4,600 tons per month in August and September compared with 16,400 tons per month in January-July.* A Soviet ship delivered 1,000 tons of timber from Cambodia, the first delivery of timber in two months.

10. Imports of general and miscellaneous cargo increased from 45,400 tons in August to 50,300 tons in September,** but remained slightly below the monthly average for January-August. Deliveries from Communist China continued to increase from the unusually low total of 2,500 tons in July, climbing from 12,000 tons in August to 18,700 tons in September. These deliveries included large amounts of steel, rails, spare parts, textiles, and cement. Imports of general and miscellaneous cargo from the USSR fell slightly from 20,500 tons in August to 18,600 tons in September and included barges, tank cars, tractors, milling machines, forging equipment, and medicines. Imports from Eastern Europe fell from 12,000 tons in August to 9,100 tons in September and consisted largely of steel products, machinery and equipment, vehicles, tires, and chemicals. No seaborne imports of arms or ammunition were detected during September.

* A Japanese shipping company was trying to arrange a charter to deliver 8,000 tons of fertilizer to North Vietnam by mid-October.

** The commodity composition of 53 percent of the general and miscellaneous cargo imported in September has not yet been identified.

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11. Seaborne exports dropped from 49,700 tons in August to 24,900 tons in September, 34,600 tons below the monthly average in January-August and the lowest total since November 1967. Exports of coal decreased for the fifth consecutive month and reached 22,300 tons, only 40 percent of the monthly average for January-August 1968. Loadings at both coal ports (18,400 tons at Cam Pha and 3,900 tons at Hon Gai) fell from August totals. All of the coal exports were delivered to Japan (18,300 tons) and China (4,100 tons).

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Table 1

North Vietnam: Foreign-Flag Ship Arrivals
January-September 1967 and 1968

	January-September 1968										January-September 1967		
Flag	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total Arrivals	Percent	Total Arrivals	Percent
Total	<u>46</u>	<u>29</u>	<u>43</u>	<u>40</u>	<u>52</u>	<u>58</u>	<u>39</u>	<u>34</u>	<u>37</u>	<u>378</u>	<u>100.0</u>	<u>302</u>	<u>100.0</u>
Communist countries	<u>36</u>	<u>21</u>	<u>31</u>	<u>27</u>	<u>34</u>	<u>41</u>	<u>31</u>	<u>22</u>	<u>23</u>	<u>266</u>	<u>70.4</u>	<u>245</u>	<u>81.1</u>
USSR	20	14	20	18	20	20	22	12	16	162	42.9	137	45.4
Eastern Europe	3	..	3	1	3	7	2	2	1	22	5.8	26	8.6
Albania	..	..	..	..	..	1	..	..	..	1	0.3	1	0.3
Bulgaria	..	..	..	..	1	1	..	..	..	2	0.5	4	1.3
Poland	3	..	3	1	2	5	2	2	1	19	5.0	21	7.0
Communist China	11	7	8	8	10	14	6	8	6	78	20.6	81	26.8
Cuba	2	..	..	..	1	..	1	..	..	4	1.1	1	0.3
Free World	<u>10</u>	<u>8</u>	<u>12</u>	<u>13</u>	<u>18</u>	<u>17</u>	<u>8</u>	<u>12</u>	<u>14</u>	<u>112</u>	<u>29.6</u>	<u>57</u>	<u>18.9</u>
Cyprus	1	1	..	..	3	2	..	3	1	11	2.9	5	1.7
Italy	..	..	1	..	..	..	..	..	..	1	0.3	2	0.7
Japan	..	..	..	..	1	..	..	..	..	1	0.3	..	..
Kuwait	..	..	..	..	..	..	..	..	1	1	0.3	..	..
Lebanon	..	..	..	1	..	1	..	..	..	2	0.5	..	..
Malta	..	..	..	..	..	1	..	..	..	1	0.3	3	1.0
Singapore	..	..	1	1	..	1	..	..	1	4	1.1	..	..
Somalia	..	..	..	..	..	..	2	..	..	2	0.5	..	..
United Kingdom	9	7	10	10	14	12	6	9	11	88	23.3	47	15.6
Illegal flag	..	..	..	1 a/	..	..	..	..	..	1	0.3	..	..

a. This ship, the Yvonne, was under Greek registry when it departed for North Vietnam. However, when the Greek government learned where the Yvonne was going, it rescinded the ship's registry. The ship then unsuccessfully tried to obtain Cypriot registry, and finally arrived in North Vietnam in mid-April illegally flying the Cypriot flag.

Table 2

North Vietnam: Tonnage of Foreign-Flag Ship Arrivals a/
January-September 1967 and 1968

Type of Ship and Flag	1968						1967	
	August		September		January-September		January-September	
	Arrivals	Thousand Gross Register Tons	Arrivals	Thousand Gross Register Tons	Arrivals	Thousand Gross Register Tons	Arrivals	Thousand Gross Register Tons
Total	<u>34</u>	<u>171.1</u>	<u>37</u>	<u>159.7</u>	<u>378</u>	<u>1,854.1</u>	<u>302</u>	<u>1,505.8</u>
Dry cargo	31	161.0	30	133.9	320	1,615.3	270	1,370.4
Tanker	3	10.1	7	25.8	58	238.8	32	135.4
Communist countries	<u>22</u>	<u>112.9</u>	<u>23</u>	<u>96.3</u>	<u>266</u>	<u>1,303.8</u>	<u>245</u>	<u>1,226.5</u>
USSR	12	58.5	16	67.8	162	765.5	137	706.2
Eastern Europe	2	18.4	1	6.7	22	167.1	26	204.1
Communist China	8	36.0	6	21.9	78	333.6	81	306.8
Cuba	..	..	..	..	4	37.6	1	9.5
Free World	<u>12</u>	<u>58.2</u>	<u>14</u>	<u>63.4</u>	<u>112</u>	<u>550.2</u>	<u>57</u>	<u>279.2</u>

a. The aggregate tonnage of ships calling does not necessarily reflect the actual volume of cargoes moving into and out of North Vietnam, but is of value as an indicator of relative changes in the volume of shipping.

Table 3

North Vietnam: Origin of Foreign-Flag Ship Arrivals, by Flag
September 1968

Flag	Type of Vessel	Origin	Port of Arrival	Cargo	Charter ^{a/}	Number
USSR						<u>16</u>
	Tanker	USSR (Far East)	Haiphong	Bulk petroleum		6
	Dry cargo	USSR (Far East)	Haiphong	Petroleum		1
	Dry cargo	USSR (Far East)	Haiphong	Bulk food		4
	Dry cargo	USSR (Far East)	Haiphong	Food and general and miscellaneous		1
	Dry cargo	USSR (Far East)	Haiphong	General and miscellaneous		1
	Dry cargo	USSR (Black Sea)	Haiphong	General and miscellaneous		2
	Dry cargo	Cambodia	Haiphong	Timber		1
Eastern Europe						<u>1</u>
	Dry cargo	Eastern and Western Europe and Singapore	Haiphong	Food and general and miscellaneous		1
Communist China						<u>6</u>
	Dry cargo	China	Haiphong	Bulk food		3
	Dry cargo	China	Haiphong	Food and general and miscellaneous		1
	Dry cargo	China	Cam Pha	In ballast to load coal		2
Free World						<u>14</u>
United Kingdom	Tanker	China	Haiphong	Bulk petroleum	Communist China	1
	Dry cargo	China	Haiphong	Bulk food	North Vietnam	1
	Dry cargo	China	Haiphong	Bulk food	Communist China	1
	Dry cargo	China	Haiphong	Food	Communist China	1
	Dry cargo	China	Haiphong	Food and general and miscellaneous	Communist China	1
	Dry cargo	China	Haiphong	General and miscellaneous	Communist China	2
	Dry cargo	North Korea	Hon Gai	Fertilizer and general and miscellaneous	North Vietnam	1

Table 3

North Vietnam: Origin of Foreign-Flag Ship Arrivals, by Flag
September 1968
(Continued)

Flag	Type of Vessel	Origin	Port of Arrival	Cargo	Charter ^{a/}	Number
United Kingdom (continued)	Dry cargo	China	Hon Gai	Bulk food and general and miscellaneous	Communist China	1
	Dry cargo	China	Hon Gai	General and miscellaneous	Communist China	2
Cyprus	Dry cargo	Eastern Europe	Hon Gai	Food and general and miscellaneous	Rumania	1
Kuwait	Dry cargo	Eastern Europe	Haiphong	Food and general and miscellaneous	Rumania	1
Singapore	Dry cargo	Eastern Europe	Haiphong	General and miscellaneous	North Vietnam	1

a. Data for Free World ships only, all under time charter.

Table 4

North Vietnam: Destination of Foreign-Flag Ship Departures, by Flag
September 1968

Flag	Type of Vessel	Destination	Port of Departure	Cargo	Number
USSR					<u>12</u>
	Tanker	USSR (Far East)	Haiphong	In ballast	4
	Dry cargo	USSR (Far East)	Haiphong	In ballast	2
	Dry cargo	USSR (Far East)	Haiphong	General and miscellaneous	1
	Dry cargo	Indonesia	Haiphong	In ballast	1
	Dry cargo	Cambodia	Haiphong	In ballast	1
	Dry cargo	Singapore	Haiphong	In ballast	1
	Dry cargo	Japan	Hon Gai	Coal	1
	Dry cargo	Japan	Cam Pha	Coal	1
Eastern Europe					<u>1</u>
	Dry cargo	North Korea	Haiphong	General and miscellaneous	1
Communist China					<u>5</u>
	Dry cargo	China	Haiphong	In ballast	1
	Dry cargo	China	Haiphong	General and miscellaneous	1
	Dry cargo	China	Cam Pha	Coal	1
	Dry cargo	China	Hon Gai	In ballast	1
	Dry cargo	Hong Kong and Eastern and Western Europe	Haiphong	General and miscellaneous (including transshipment to Japan)	1
Cuba					<u>1</u>
	Dry cargo	Japan	Cam Pha	Coal	1

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Table 4
North Vietnam: Destination of Foreign-Flag Ship Departures, by Flag
September 1968
(Continued)

Flag	Type of Vessel	Destination	Port of Departure	Cargo	Number
Free World					8
United Kingdom	Tanker	China	Haiphong	In ballast	1
	Dry cargo	China	Haiphong	In ballast	3
	Dry cargo	North Korea	Haiphong	In ballast	1
Kuwait	Dry cargo	Singapore	Haiphong	In ballast	1
Lebanon	Dry cargo	China	Haiphong	In ballast	1
Singapore	Dry cargo	Japan	Cam Pha	Coal	1

Table 5

North Vietnam: Imports Carried on Foreign-Flag Ships a/
September 1968 and January-September 1967 and 1968

Flag	September 1968						Thousand Metric Tons	
	Foodstuffs	Fertilizer	Petroleum	Timber	Miscellaneous b/	Total	January-September	
							1967	1968
Total	<u>48.4</u>	<u>3.9</u>	<u>33.4</u>	<u>1.0</u>	<u>50.3</u>	<u>137.0</u>	<u>1,090.8</u>	<u>1,474.8</u>
Communist countries	<u>27.1</u>	<u>0</u>	<u>26.4</u>	<u>1.0</u>	<u>21.8</u>	<u>76.3</u>	<u>862.5</u>	<u>979.9</u>
USSR	14.6	..	26.4	1.0	18.6	60.5	514.5	649.9
Eastern Europe	0.1	..	..	..	2.7	2.7	87.1	124.0
Communist China	12.4	..	..	..	0.6	13.0	248.6	171.4
Cuba	..	..	..	..	..	..	12.2	34.6
Free World	<u>21.3</u>	<u>3.9</u>	<u>7.0</u>	<u>0</u>	<u>28.5</u>	<u>60.7</u>	<u>228.3</u>	<u>494.9</u>

a. Imports include some estimates of cargoes, using methods which have proved to be highly reliable.
b. Including unidentified cargo of 26,600 tons.

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Table 6

North Vietnam: Exports Carried on Foreign-Flag Ships ^{a/}
September 1968 and January-September 1967 and 1968

Flag	September 1968			Thousand Metric Tons	
				January-September	
	Coal	Miscellaneous	Total	1967	1968
Total	<u>22.3</u>	<u>2.5</u>	<u>24.9</u>	<u>484.0</u>	<u>500.9</u>
Communist countries	<u>17.1</u>	<u>2.5</u>	<u>19.6</u>	<u>419.7</u>	<u>421.2</u>
USSR	8.0	0.7	8.7	222.9	134.2
Eastern Europe	..	Negl.	Negl.	47.8	16.3
Communist China	4.0	1.8	5.9	143.5	264.8
Cuba	5.0	..	5.0	5.4	5.9
Free World	<u>5.3</u>	<u>0</u>	<u>5.3</u>	<u>64.3</u>	<u>79.6</u>

a. Exports include some estimates of cargoes, using methods which have proved to be highly reliable.

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